How to integrate your account with a CRM/CMS system

Our system offers several methods to sychronize your database with external data sources, as well as to integrate the administration console with third-party software. For detailed information please see this document, or visit this page to read an overview of possible integrations.

SUBSCRIBING USERS:

There are two ways to synchronize the databases:

- **Real-time synchronization**: when a user is added to the external database, a call to the API (xmlSubscribe.xml) imports the data as subscribed to one or more lists. Likewise, unsubscribers from an external database can be unsubscribed from the list(s) by using the API (xmlUnsubscribe.xml). This procedure requires a slight modification to the software that manages the external database, so that the API can be invoked. See the above-mentioned document for details (Chapter 5).

- **Daily synchronization**: an automatic process imports a .csv file from an FTP location, handling all changed records at once (e.g. new subscribers, unsubscribed, users with updated data). In order to perform the process successfully, a file needs to be generated daily and posted to an FTP site that has been configured for you. Batch Mode is described in chapter 3 of the above mentioned document. Open a support ticket to request the creation of an FTP site, if you are interested in using this import method.

UNSUBSCRIBING USERS:

The same is true about unsubscribing users:

- **Real-time synchronization**: You can communicate with our system via Web Services so that an account's status is updated in real-time when a variety of events occur. These events include:
  - Subscription request (user imported as pending);
  - Subscription confirmed (user imported as subscribed or pending status updated to subscribed);
  - Unsubscription (user imported as unsubscribed or subscribed status updated to unsubscribed);
  - Cancellation (user removed from database).

- **Daily synchronization**: by uploading a file to an FTP location as mentioned above. You can include all sorts of information in the file, including:
  - list ID
  - unsubscription date
  - unsubscription reason
  - personal data

  You can also filter unsubscribers according to these parameters:

  - *List to which they belong (included/excluded)*
  - *Unsubscription date (full list/previous day)*
  - *Unsubscription reason (included/excluded)*

  For example, it is possible to export all the unsubscribers from the previous day, from list 1, excluding those who clicked on the unsubscription link.

Sending Messages from a Third-Party Application

When mailings are managed through third-party software (e.g. sending messages from within a CRM system), the implementation of web services into the software itself is required. That is: at this time you cannot simply configure our system as the SMTP provider. You can certainly send messages through the system, but it has to be done through the API.

There are 4 main web services:

- WSMailUpSend: checks the creation and sending of emails and text messages;
- WSMailUpImport: manages the import process of databases of contacts in XML format;
- WSMailUpManage: allows to create and manage groups and lists;
- WSMailUpReport: allows to download statistics about users and/or mailings.

A detailed description of these web services can be found in chapter 5 of the above mentioned document.